

**Gas T&D New Product Approval Checklist**

**Section 1: Introduction**

Step	Step Description	Who	Date Complete												
1	<p>OBTAIN product/modification information from the supplier.</p> <p>PROVIDE a description, reason for submitting the product or product modification for evaluation, and product benefits and costs:</p> <p><b>Standard Reasons:</b></p> <p><input type="checkbox"/> New technology</p> <p><input type="checkbox"/> Design changes</p> <p><input type="checkbox"/> Material Problem Reports (MPRs)</p> <p><input type="checkbox"/> Replacement for discontinued product</p> <p><input type="checkbox"/> Product substitution</p> <p><input type="checkbox"/> Economics</p> <p><input type="checkbox"/> Safety</p>														
2	<p>DETERMINE whether the new product or modification is subject to this Utility Procedure TD-4001P-04 by reviewing the following criteria:</p> <table border="1" data-bbox="296 1227 1107 1644"> <thead> <tr> <th data-bbox="296 1227 903 1279">Criteria</th> <th data-bbox="903 1227 1003 1279">Yes</th> <th data-bbox="1003 1227 1107 1279">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="296 1279 903 1391">a) Does the product <b>not</b> affect the integrity of the gas transmission and distribution (T&amp;D) system?</td> <td data-bbox="903 1279 1003 1391"></td> <td data-bbox="1003 1279 1107 1391"></td> </tr> <tr> <td data-bbox="296 1391 903 1469">b) Is the product part of a customized design job approved by a professional engineer?</td> <td data-bbox="903 1391 1003 1469"></td> <td data-bbox="1003 1391 1107 1469"></td> </tr> <tr> <td data-bbox="296 1469 903 1644">c) Is the product reviewed and approved by other Pacific Gas and Electric Company (Company) departments or teams (e.g., personal protective equipment [PPE] or environmental cleanup materials)?</td> <td data-bbox="903 1469 1003 1644"></td> <td data-bbox="1003 1469 1107 1644"></td> </tr> </tbody> </table> <p><b>If the answer to any of the above three questions is yes, Then, DISCONTINUE this procedure and OBTAIN approval to review the product from the appropriate gas technical team.</b></p>	Criteria	Yes	No	a) Does the product <b>not</b> affect the integrity of the gas transmission and distribution (T&D) system?			b) Is the product part of a customized design job approved by a professional engineer?			c) Is the product reviewed and approved by other Pacific Gas and Electric Company (Company) departments or teams (e.g., personal protective equipment [PPE] or environmental cleanup materials)?				
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	<p><b>If the answer to all of the above three questions is no, Then, REVIEW the following criteria for applicability:</b></p> <table border="1" data-bbox="296 461 1107 972"> <thead> <tr> <th data-bbox="296 461 855 510">Criteria</th> <th data-bbox="855 461 1007 510">Yes</th> <th data-bbox="1007 461 1107 510">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="296 510 855 591">a) Is the product a standardized product that will bear gas pressure?</td> <td data-bbox="855 510 1007 591"></td> <td data-bbox="1007 510 1107 591"></td> </tr> <tr> <td data-bbox="296 591 855 672">b) Does the product affect the Company's cathodic protection systems?</td> <td data-bbox="855 591 1007 672"></td> <td data-bbox="1007 591 1107 672"></td> </tr> <tr> <td data-bbox="296 672 855 752">c) Does the product affect the coatings or wraps of the gas system?</td> <td data-bbox="855 672 1007 752"></td> <td data-bbox="1007 672 1107 752"></td> </tr> <tr> <td data-bbox="296 752 855 860">d) Does the product affect the measurement or pressure regulation of the gas system?</td> <td data-bbox="855 752 1007 860"></td> <td data-bbox="1007 752 1107 860"></td> </tr> <tr> <td data-bbox="296 860 855 972">e) Is the product an instrument used to verify code-required construction, maintenance, or operations activities?</td> <td data-bbox="855 860 1007 972"></td> <td data-bbox="1007 860 1107 972"></td> </tr> </tbody> </table> <p><b>If the answer to all of the above five questions is no, Then, DISCONTINUE this procedure, and OBTAIN approval to review the product from the appropriate gas technical team.</b></p> <p>INDICATE whether the product/modification is applicable to this procedure:</p> <p>DOCUMENT the reason:</p>	Criteria	Yes	No	a) Is the product a standardized product that will bear gas pressure?			b) Does the product affect the Company's cathodic protection systems?			c) Does the product affect the coatings or wraps of the gas system?			d) Does the product affect the measurement or pressure regulation of the gas system?			e) Is the product an instrument used to verify code-required construction, maintenance, or operations activities?				
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3	SUBMIT the product/modification to the gas technical team for review.																				
4	<p>RECORD the gas technical team decision on whether to proceed with the product evaluation and explanations.</p> <p><b>Decision:</b>            ___ Approved            ___ Not Approved</p> <p><b>Reasons:</b></p>																				

Step	Step Description	Who	Date Complete
5	RECORD the gas technical team assigned evaluator:		
6	COMMUNICATE the decision to the affected supplier and initiator.		

**Section 2: Evaluation**

Step	Step Description	Who	Date Complete
1	<p>OBTAIN detailed product/modification information from the supplier:</p> <ul style="list-style-type: none"> <li>___ Material and technical specifications</li> <li>___ Lab tests or certifications</li> <li>___ Maintenance and operating instructions</li> <li>___ Installation instructions</li> <li>___ Samples</li> <li>___ Product demonstrations</li> </ul>		
2	<p>COMPARE the product features and costs with current and other products:</p> <ul style="list-style-type: none"> <li>✓ Technical features</li> <li>✓ Reliability</li> <li>✓ Quality</li> <li>✓ Safety</li> <li>✓ Performance</li> <li>✓ Material Problem Reports (MPRs)</li> <li>✓ Service</li> <li>✓ Supplier attributes</li> <li>✓ Commercial reasons</li> <li>✓ Economics</li> </ul> <p>ATTACH a report covering the above items, as appropriate.</p>		
3	<p>BENCHMARK with three other users of the product and record the results.</p> <p>ATTACH a report, as appropriate.</p>		

Step	Step Description	Who	Date Complete
4	PERFORM any needed shop tests to verify technical capabilities.		
5	RECORD the shop test results.  ATTACH a report, as needed.		
6	PERFORM any needed field tests to validate the usability of the product.		
7	RECORD the field test results.  ATTACH a report, as needed.		
8	MAKE a recommendation for product use at the Company:  ____ Product is recommended for Company use.       ____ Product is <b>not</b> recommended for Company use.		

**Section 3: Approval (Gas Technical Team)**

Step	Step Description	Who	Date Complete
1	REVIEW the evaluation report and recommendation.		
2	VOTE on the recommendation.		
3	RECORD the vote result on the issues log, and store all documents on the team SharePoint site.	Standards Facilitator	
4	COMMUNICATE the decision and reasons for the decision to the evaluator and initiator.	Standards Facilitator	

**Section 4: Communication / Deployment**

Step	Step Description	Who	Date Complete															
1	PREPARE changes to affected Company documents, and DEVELOP new documents to cover the proposed changes, following the steps in <a href="#">Utility Work Procedure WP4000-01, "Gas Document Development and Update Process."</a>																	
2	PREPARE an announcement (e.g., bulletin) and communication plan (conference calls, road shows, etc.) to cover the initial communication of the new product deployment.																	
3	<p>ENSURE that all necessary deployment prerequisites are completed before announcing the new product, including the following activities:</p> <table border="1" data-bbox="261 846 1034 1375"> <thead> <tr> <th data-bbox="261 846 836 898">Activity</th> <th data-bbox="836 846 938 898">Yes</th> <th data-bbox="938 846 1034 898">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="261 898 836 976">a) Training and operator qualified (OQ) programs are updated.</td> <td data-bbox="836 898 938 976"></td> <td data-bbox="938 898 1034 976"></td> </tr> <tr> <td data-bbox="261 976 836 1122">b) Strategic sourcing activities are completed (material codes are established, vendor's initial expected demand is met, etc.).</td> <td data-bbox="836 976 938 1122"></td> <td data-bbox="938 976 1034 1122"></td> </tr> <tr> <td data-bbox="261 1122 836 1234">c) Required estimating programs (e.g., Fast Flow Estimating [FFE]) reflect the change.</td> <td data-bbox="836 1122 938 1234"></td> <td data-bbox="938 1122 1034 1234"></td> </tr> <tr> <td data-bbox="261 1234 836 1375">d) Other computer programs (e.g., Integrated Gas Information System [IGIS]) potentially affected by the change are ready for the new product.</td> <td data-bbox="836 1234 938 1375"></td> <td data-bbox="938 1234 1034 1375"></td> </tr> </tbody> </table>	Activity	Yes	No	a) Training and operator qualified (OQ) programs are updated.			b) Strategic sourcing activities are completed (material codes are established, vendor's initial expected demand is met, etc.).			c) Required estimating programs (e.g., Fast Flow Estimating [FFE]) reflect the change.			d) Other computer programs (e.g., Integrated Gas Information System [IGIS]) potentially affected by the change are ready for the new product.				
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4	OBTAIN approval for the timing of the announcement from the technical team.																	
5	ANNOUNCE the changes, and DEPLOY the communication plan.																	

**Section 5: Training**

<b>Step</b>	<b>Step Description</b>	<b>Who</b>	<b>Date Complete</b>
1	FACILITATE the development of training programs and job aids for the new product.		
2	DETERMINE the changes to the OQ plan with the personnel charged with OQ plan duties.		
3	DETERMINE training needs outside the OQ program with the Company's training personnel.		